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CableVision

THE NEWS AND FEATURES WEEKLY OF THE CABLE TELEVISION INDUSTRY

TCI DECIDES TO TEST ITS OWN APPROACH TO PPV

CABLE, BROADCASTERS STILL AT IMPASSE ON MUST-CARRY

MTV BROADENING PROGRAMMING FORMAT WITH SERIES RUN

NO QUICK TURNAROUND SEEN IN ADDRESSABILITY MARKET

ANNUAL CONSTRUCTION SURVEY: '86 SPENDING PUT AT $1.2 BILLION

CableVision

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James Palmer former chairman of COR Electronics and a member of the board of directors is leading a group of shareholders in the sale of their interest in the Pennsylvania-based company. Vision Business, District Cablevision Limited Partnership, winner of the Washington, D.C., franchise, has asked the D.C. Public Service Commission to lower the rates which the Chesapeake and Potomac Telephone Co. can charge for access to conduits.

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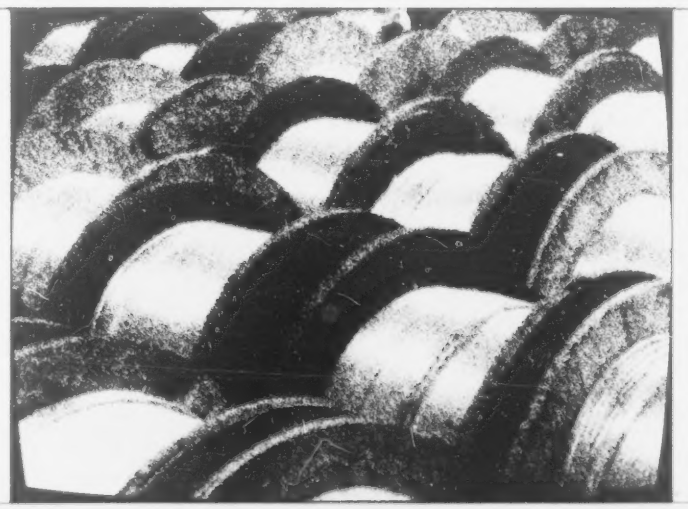


Cover story 32
CableVision's 1986 Construction Survey shows yellow lights flashing in MSO budgeting for hardware, newbuilds and upgrades. However, the future still looks promising as long as there is a need for maintenance, a demand for better equipment and the addition of new subscribers in already wired markets. Planning for the addressable converter market also has inspired wariness after last year's optimism led to inflated inventories.

Construction survey '86

At $1.2 billion, things could be much worse

With caution prevailing on all sides, whatever surprises may be in store for the 1986 construction market in cable television should pan out to be in the plus column. And given the uncertainties underlying operators' budgeting for 1986, such surprises could abound.

The results of this year's *CableVision* Construction Survey predict an overall hardware and construction outlay of $1.21 billion for 1986, against actual expenditures of $1,306 billion in 1985, representing a drop of 7 percent. In terms of total plant mileage, the falloff is sharper, with total mileage planned in newbuilds and upgrades for 1986 at 56,827 miles versus 64,735 miles in 1985, representing a reduction of 12 percent.

That the percentage drop in actual dollar outlays will be lower than the percentage decline in construction mileage is a function of higher projected purchasing levels in subscriber equipment and, to a lesser extent, production gear. Projected spending in converters for 1986 comes to $432 million, $323 million of which will be for addressable converters, as opposed to outlays in 1985 of $383 million, $264 million of which went to addressable boxes (see accompanying story this page). Also up over last year is projected spending for commercial insertion equipment, pegged at $12.1 million for 1986 versus $8.3 million.

Where caution manifests itself most vividly in operator projections is on the upgrade side of the ledger. Last year, upgrade and rebuild mileage, at 28,057 miles, represented 43 percent of the total construction mileage. This year the 26,195 projected rebuild mileage total equals 46 percent of the pie—only a slight difference in an environment where, clearly, there remains a huge amount of work to be done as franchises come up for renewal.

Commented one of the respondents to this year's construction survey, all of whom were promised anonymity, "We know we have to upgrade far more than we have; the question is when. Until things settle out in the acquisitions market, we're not going to be putting the attention and money we'd like into upgrades."

Another factor in the projections that could turn out to be stronger than the figures indicate for 1986 is the newbuild mileage. Again, operators were budgeting cautiously in light of the confusion over timetables in what's left of the big city construction schedule.

But even if this year's construction market remains at or near the projected totals, the outlook is far from daunting. At $1.2 billion, the annual construction nut is less than the 1982 peak of $1.7 billion but not nearly as far off as some observers expected.

According to Gordon Halverston, vice president for CATV sales and marketing at Anixter Communications, a number of factors are contributing to his assessment that "cable will always be a very solid business for us." In the first place, he noted, unavoidable corrosion, especially along salt water coastal areas, keeps the demand for replacement parts high. Moreover, he noted, the need for improved quality in connectors as ever more gadgets interface with the cable line and low-quality imported connectors wear out keeps the market in drop cable, connectors and other fittings hopping.

Halverston also noted that while the demand for aerial plant gear from his warehouses has dropped as much as 20 to 25 percent, underground building requirements remain strong, reflecting the continuing extension of cable systems into new subdivisions where underground wiring is required.

Another firm with its ear to the ground is Burnup & Sims. There, according to Kevin Lynch, vice president of B&S subsidiary Capscan Cable, the thinking is that while the market will drop by about 8 percent in 1986, which is less than the 12 percent mileage decline envisioned in this year's *CableVision* construction survey, the upgrade percentage of the construction total will continue to rise.

The race to wire America is all but completed, but cable construction remains an ongoing task. Maintenance and parts replacement, extensions of existing systems into new subdivisions, the addition of new subscribers in already wired markets and the mounting demand for more sophisticated subscriber equipment all combine to ensure continuing viability no matter what the timetables for upgrades and the remaining newbuilds turn out to be.

Addressability: cautious sellers may be surprised

By Virginia Munger Kahn

A person could get vertigo trying to adjust a company's planning to the needs of the addressable converter market. Just as manufacturers are struggling to get out from under inflated inventories created by over optimism about the sales prospects for 1985, there are signs that their wariness about the 1986 market could leave them scrambling to keep up with orders.

Operators' uncertainties about pay-per-view and the benefits of addressability combined with the slow pace of construction and rebuilding led to an estimated 15 to 20 percent drop in addressable converter sales during 1985 compared to 1984. According to estimates provided by converter manufacturers, the number of units shipped last year was 3.1 million against 3.5 million to 3.7 million the year before.

As a result, manufacturers, who expected a surge in 1985, are extremely cautious about the prospects for this year and point to the initial sales pace as further cause for concern. But the budgetary planning of operators appears to be pointing in another direction, toward increasing sales that could put the market over the $300 million mark for the year.

Two surveys of *CableVision* magazine support this view. In the construction survey (p. 34), projections from statistics supplied by respondents indicate planned purchases in 1986 will be in the $323 million range as opposed to the $264 million that was spent in 1985. And in another study, the magazine found that 40 percent of the cable systems responding to a questionnaire definitely or probably will purchase addressable converters in 1986.

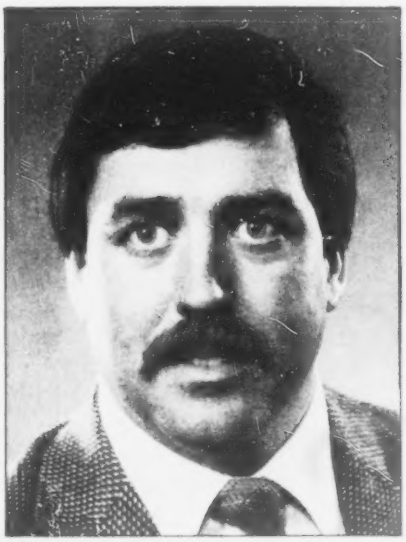
But, as encouraging as these signals might be, manufacturers are probably well advised to remain cautious, insofar as the timing of the industry's movement toward addressability is

(Continued on p. 36)

Construction Forecast

New plant construction (in miles)	1985 actual	1986 projected
Underground	10,423	9,752
Aerial	26,255	21,880
Total	**36,678**	**31,632**
Cost ($ in thousands)		
Antennas and towers	$ 4,926	$ 1,789
Microwave equipment	13,491	10,502
Headend	31,908	23,842
Line amplifiers	91,380	74,482
Cable, trunk & feeder	82,795	67,728
Cable, drop	41,351	33,211
Taps and outlets	21,315	17,302
Earth stations	18,391	14,554
Traps	15,812	9,789
Commercial insertion equipment	8,297	12,214
Other studio and mobile production gear	12,429	10,504
Construction services (make-ready, strand mapping, etc.)	88,603	72,880
Construction labor and equipment	230,176	192,963
Total	**$660,874**	**$541,760**
Replacement plant construction (in miles)		
Underground	7,384	6,065
Aerial	20,673	20,130
Total	**28,057**	**26,195**
Cost ($ in thousands)		
Antennas and towers	3,756	3,738
Microwave equipment	15,775	13,175
Headend	20,541	22,454
Line amplifiers	61,562	53,537
Cable, trunk & feeder	88,255	81,806
Cable, drop	41,891	40,830
Taps and outlets	14,527	12,514
Traps	6,751	6,386
Total	**252,058**	**234,440**
Subscriber equipment ($ in thousands)		
Converters—non-addressable	129,725	108,642
Converters—addressable	263,567	323,189
Add-ons (VCR interface, FM hookups, remotes, etc.)	9,824	10,761
Total	**393,116**	**442,592**
Grand total	**1,306,048**	**1,218,792**

The totals of the survey responses, compiled by [illegible] and [illegible], [illegible] reference have been rounded to the nearest [illegible].



'We are one of the few [sellers of off-premise systems] left and we hope we can continue. The industry is not quick to grab on to new equipment.'

—Jim Quigley

very much a function of its response to pay-per-view.

Right now, according to Dantia Quirk, publisher of the newsletter "Addressability Update," the number of addressable homes is in the neighborhood of 6.7 million, a figure that squares with other researchers' efforts to get at the size of the addressability base. Quirk said that earlier figures for 1984, which she termed less reliable than her current numbers, put the base at 5.3 million.

Assuming the latter figure is accurate, it would mean the number of addressable homes increased by 1.4 million or 26 percent during the past year. (Presumably, the remainder of the 3.1 million addressable boxes shipped in 1985 were replacements for earlier generation gear.) Should the trend continue, the addressable subscriber base at the end of 1986 could top 8 million, which would come a lot closer to the threshold base that most observers believe is essential for the viability of nationally delivered pay-per-view services.

Flat sales

According to manufacturing executives, unit sales for 1985 began relatively flat, if not slightly down from 1984, with the downward trend picking up speed in the second half of the year.

"We all built up these huge inventories" at the end of 1984, said one manufacturing representative. By the middle of 1985, predictions on unit sales did not come true and an intense period of cost cutting has ensued, she said.

The pressures on margins from the falloff in sales are expected to be reflected in the financial reports these companies will issue over the next few months. According to General Instrument, whose fiscal year ends in February, revenues in the broadband communications group will be down about 10 percent from last year's $340 million in sales. For Zenith Electronics, nine-month cable product sales plummeted 68 percent to $50 million in 1985 compared to the same period 1984.

However, Scientific-Atlanta, whose fiscal years ends in June, reported an increase in communications group revenues for the first half of 1985 to $284.4 million compared to 1984, but a slight decrease for the second half to $144.2 million compared to the same period the year before.

'I think most [manufacturers of off-premise systems] have abandoned the idea of ever making a go of it.'

—Ed Knapp

According to figures supplied by the companies themselves, General Instrument's Jerrold division held on to its pre-eminent position in the market by shipping 1.2 million to 1.3 million addressable converters last year—more than 38 percent of all addressable units shipped in 1985. According to a spokesman for the company, General Instrument actually increased its share of the addressable market as a result of the strong performance of Tocom's new baseband converter, the Tocom-VIP. The total installed addressable base for Jerrold reached 4.9 million units, with Tocom claiming an additional 425,000 units in the field.

Scientific-Atlanta, which claims the number two spot in the market, and is rapidly gaining additional market share, shipped 800,000 converters last year or about 25 percent of the total 3.1 million units shipped. The total installed base for Scientific-Atlanta reached 1.7 million units last year.

According to Zenith, it held on to its third place position with 15 percent to 20 percent of the total addressable market last year. While the company did not release figures, a spokesman said that unit sales are anticipated to be "substantially lower" than 1984 figures of 1.2 million units shipped. Zenith has 3 million converters in the field, the company said.

According to Oak Communications President John Donohue, his company shipped 225,000 addressable units last year, down from 300,000 units in 1984. Oak has a total installed base of 1.5 million addressable converters.

Off-premises systems

Selling off-premises addressable systems proved even more difficult than in-home systems. Some manufacturers, including C-COR Electronics and Augat, reported they were no longer actively marketing their product. "The market is just not there," said Ed Knapp, market development manager for Augat Broadband Communications Group. "By the first quarter of 1985, it became apparent to us."

Knapp blamed the technology's difficulties on consumer disinterest in interactive services and concomitant operator unwillingness to make the necessary capital investments. The technology's potential market shrunk further as on-premises equipment became less expensive and more reliable, he said. "I think most [manufacturers of off-premises systems] have abandoned the idea of ever making a go of it," said Knapp.

There are exceptions, however, and both Pico Products and AM Cable In-

In-home addressable converters

Manufacturer Contact	Product	Channel capacity	Price	Security
Eagle Comtronics				
Hamlin				
Jerrold Division General Instrument				
Kanematsu-Gosho				
M A-COM				
Magnavox				
Oak Communications				
Pioneer				
Regency				
Scientific-Atlanta				
Tocom Division of General Instrument				
Zenith				

'It's a classic case of over-capacity.'

—Vito Brugliera

dustries have recently sold off-premises systems to cable operators. "We are one of the few left," said Jim Quigley, sales manager at Pico, "and we hope we can continue. The industry is not quick to grab on to new equipment."

Pay-per-view

The uncertain status of pay-per-view, which is inexorably tied to addressability, illustrates that this point can apply to new services as well. Cable operators and converter manufacturers blamed much of last year's slow growth on continuing doubt among operators about pay-per-view.

According to a survey conducted last May by Malarkey-Taylor Associates among executives in the top 15 MSOs, one third to one half expressed doubts about going addressable. As Sam Book, president of the research division at Malarkey-Taylor, noted, those executives most enthusiastic about pay-per-view were equally "gung-ho" about addressability, while those with doubts, raised the most questions about going addressable. "The two pretty much go hand-in-hand," said Book.

He noted that the less enthusiastic executives expressed the belief that in the long run their systems would be addressable, but at this point in time, the technology is not worth the incremental revenues that could be generated by saving on truck rolls, theft of service, etc. Pay-per-view had to be the primary motivating factor in going addressable, they said.

Bottom-line concerns and the difference in the cost of addressable converters versus non-addressable units continue to play a role in operators' decisions about addressability. Doug Dittrick, president of Tribune Cable, noted that while the company decided to install Texscan's off-premises addressable systems in its newbuild, Tribune is not putting addressable converters in its existing systems, even when given the opportunity to do so as part of a rebuild. "The differential in cost is just not worth it," said Dittrick, who noted that many of Tribune's systems are not located in major markets. "In a larger system, you can write off the cost over a larger base. We want a comfort level that is just not there, yet."

Larger systems in the as-yet unbuilt metropolitan areas would appear to provide a potentially lucrative market for addressable unit sales, but the snail's pace at which the remaining cities are being built has precluded any larger impact on the market in 1985. In addition, rebuild activity has been less than anticipated.

Some observers also blame quality control problems experienced by addressable converter manufacturers two years ago as an impetus to keeping wary buyers at bay. At one point it was not uncommon for some manufacturers to be experiencing 20 percent to 40 percent failure rates, noted one industry executive.

The problem of incompatibility with VCRs and other consumer equipment also remains a key area of concern. While manufacturers have spent a great deal of time and money making their addressable units "VCR friendly," the VCR issue remains a key stumbling block for many cable operators.

Finally, manufacturers blame the "back to basics" movement and the decreasing dependence cable operators have on pay, particularly multi-pay, for their revenue stream. "As premium service revenues go down, putting in addressable converters only makes sense with two or more pays," said Vito Brugliera, vice president for marketing at Zenith Cable Products.

Tough market

The dip in addressable unit sales came particularly hard after the high expectations fostered by peak sales in 1983 and 1984. The results for the manufacturers were high levels of inventory, and by mid-1985, an ensuing scramble to unload that stock through price wars. Converters manufacturers say they see a continuation of price

'We want a comfort level that is just not there, yet.'

—Doug Dittrick

'People are just not willing to change out to a two-way plant.'

—Neil DeCostanza

cutting over the next few months, although inventories have begun to stabilize. Said Zenith's Brugliera, "It's a classic case of over-capacity."

Additional pricing pressure, particularly for those manufacturers with large operations in Japan, are expected as a result of the dollar's recent slide against the Japanese yen. Almost all the converter manufacturers have at least some components assembled in Japan, and some, such as Scientific-Atlanta, Oak Communications, Pioneer and Panasonic, depend heavily on Japanese input for their product.

But, despite the difficulties in the marketplace, some manufacturers, most notably Scientific-Atlanta and Oak, have opened up new opportunities for growth. While some industry observers are fond of saying the converter business is not technology driven, the technological capabilities and performance of both Oak's Sigma converter and Scientific-Atlanta's 5550 series have helped spur talk in the industry that these companies are "on the move."

In fact, S-A is considered a good bet to rival Jerrold in the addressable converter market next year, say industry sources. But, Robert Anastasi, analyst at Robinson Humphrey/American Express, said S-A's growth will not come at the expense of General Instrument. Instead, he said, that company's converter growth will impact most heavily on "niche" players. According to Anastasi, what will drive cable operators toward the industry's two largest suppliers is the desire for one-stop shopping where everything from a satellite dish to an amplifier can be bought. "This is not a niche business anymore," he said. "S-A will go from being a distant second to splitting at least two-thirds of the market with General Instrument."

John Donohue, Oak Communications' president, disagreed. "Sure, it makes it difficult for us to compete against companies with distribution capability," he said. "But operators have been very willing to separate distribution equipment out from in-home terminals."

Oak has just announced a $23-million order from Maclean Hunter Cable to supply 150,000 Sigma units to its Suburban Cablevision system in New Jersey. In addition, the company is expected to be the supplier for Barden Communications' Detroit newbuild in which Maclean Hunter has a 49 percent interest.

'Jerrold has gotten out of building product for product's sake.'

—Pete Morse

New product edge

Oak's re-emergence as a viable competitor, after a two-year period of financial upheaval and legal problems, led at least one manufacturer to bemoan the fact that his company had not been more active in developing new product for the market. "Scientific-Atlanta and Jerrold are strong, and now we have Oak to contend with," he said. "We've fallen behind."

Manufacturers that have the biggest battle before them, however, are companies like Sprucer, which offers a sophisticated, pricey two-way converter. Not only must the company contend with a tough, competitive market for converters in general, but it must also fight the battle for two-way in a world dominated by one-way plant. "People are just not willing to change out to a two-way plant," said Neil DeCostanza, manager of sales and marketing.

The New York Times Cable system in southern New Jersey is one company, however, that has taken the plunge, and, according to Sprucer, more than 30,000 units have been installed to date there.

Apparently, Kanematsu-Goshu, the trading company that distributes Sprucer, is willing to wait for the market to develop. Sprucer represents just a fraction of the company's $15 billion to $20 billion in revenues worldwide.

The best way to regain market share is to introduce new product, and despite the tough competitive environment, several manufacturers said they were ready to do just that. Zenith, which at one time held the number two spot in market share, said it is readying a new product to be announced at the national show in Dallas in an attempt to recapture that position. Magnavox, which currently has a 1 to 2 percent share, is also readying new product for introduction during the third quarter.

"Jerrold has gotten out of building product for product's sake," said Pete Morse, vice president for marketing, echoing comments made by other manufacturers. "All the [converter] features are geared just to subscribers or the cable operator," he said. Morse expressed surprise at the length of time it has taken addressability to come to the industry, saying that the technology "has brought a lot to cable in terms of [operator] control."

Obviously, much depends on what happens with pay-per-view. As Jerrold's Morse put it, "There is no single event that would mean more for us or for cable operators" than the full-scale onset of pay-per-view.

Pay Per View Supply Chart

A listing of movies and events entering PPV distribution over the next three months.

March

Commando (3.6) — 20th Century Fox
MPAA Rating: R
Cast: Arnold Schwarzenegger, Rae Dawn Chong, Vernon Wells, James Olson
Running Time: 91 mins.

Compromising Positions (3.20) — Paramount
MPAA Rating: R
Cast: Susan Sarandon, Raul Julia, Edward Herrmann, Judith Ivey
Running Time: 90 mins.

Mad Max Beyond Thunderdome (3.13) — Warner Bros.
MPAA Rating: PG-13
Cast: Mel Gibson, Tina Turner
Running Time: 106 mins.

Mask (3.13) — Universal
MPAA Rating: PG-13
Cast: Cher, Sam Elliott, Eric Stoltz
Running Time: 120 mins.

Maxie (3.27) — HBO Enterprises
MPAA Rating: PG
Cast: Glenn Close, Mandy Patinkin, Bill Cosby, Ilene Graff
Running Time: 97 mins.

Silver Bullet (3.20) — Paramount
MPAA Rating: R
Cast: Gary Busey, Everett McGill, Corey Haim, Megan Follows
Running Time: 70 mins.

Transylvania 6-5000 (3.27-4.1) — New World
MPAA Rating: R
Cast: Jeff Goldblum, Ed Begley, Jr., Joseph Bologna, Carol Kane
Running Time: 92 mins.

Weird Science (3.13) — Universal
MPAA Rating: PG-13
Cast: Michael Oliveberg, Hall Bartlett, Ilan Mitchell-Smith
Running Time: 94 mins.

April

The Annihilators (4.22) — New World
MPAA Rating: R
Cast: Christopher Stone, Andy Wood, Lawrence Hilton-Jacobs, Robert Davi
Running Time: 86 mins.

Bad Medicine (4.3) — 20th Century Fox
MPAA Rating: PG-13

Arnold Schwarzenegger is Colonel John Matrix in "Commando."

Cast: Alan Arkin, Steve Guttenberg, John Heggerty
Running Time: 89 mins.

Boys Next Door — New World
MPAA Rating: R
Cast: Maxwell Caulfield, Charlie Sheen, Patti D'Arbanville

Creator (4.3) — Universal
MPAA Rating: R
Cast: Peter O'Toole, Mariel Hemingway
Running Time: 108 mins.

The Glenn Miller Story (4.1) — Universal
MPAA Rating: G
Cast: James Stewart, June Allyson, Louis Armstrong
Running Time: 112 mins.

Grunt — New World
MPAA Rating: R
Cast: "Magic" Schwartz, Steven Capelli, Wally Lounge, Marcus Stone

My Man Adam (4.20) — Tri-Star
MPAA Rating: R
Cast: Raphael Sbarge, Page Hannah, Veronica Cartwright, Dave Thomas
Running Time: 87 mins.

National Lampoon's European Vacation (4.10) — Warner Bros.
MPAA Rating: PG-13
Cast: Chevy Chase, Beverly D'Angelo, Dana Hill, Jason Lively
Running Time: 91 mins.

Pee Wee's Big Adventure (4.10) — Warner Bros.
MPAA Rating: PG
Cast: Pee Wee Herman, Elizabeth Daily, Mark Holton, Diane Salinger
Running Time: 92 mins.

Witness (4.13) — Paramount
MPAA Rating: R
Cast: Harrison Ford, Kelly McGillis, Alexander Godunov, Lukas Haas
Running Time: 112 mins.

May

Black Moon Rising — New World
MPAA Rating: R
Cast: Tommy Lee Jones, Robert Vaughn, Bubba Smith
Running Time: 100 mins.

Cocoon (5.1) — 20th Century Fox
MPAA Rating: PG-13
Cast: Don Ameche, Steve Guttenberg, Maureen Stapleton, Brian Dennehy
Running Time: 1.8 mins.

Fever Pitch (5.1) — MGM/UA
MPAA Rating: R
Cast: Ryan O'Neal, Catherine Hicks, Giancarlo Giannini
Running Time: 96 mins.

The Goonies (5.1) — Warner Bros.
MPAA Rating: PG
Cast: Sean Astin, Josh Brolin, Jeff Cohen, Corey Feldman, Martha Plimpton, Ke Huy Quan
Running Time: 114 mins.

To Live & Die in L.A. (5.1) — MGM/UA
MPAA Rating: R
Cast: William Petersen, Willem Dafoe, John Pankow
Running Time: 110 mins.

Sesame Street Presents Follow That Bird (5.14) — Warner Bros.
MPAA Rating: G
Cast: Jim Henson's Sesame Street Muppets
Running Time: 84 mins.

White Nights (5.1) — Columbia
MPAA Rating: PG-13
Cast: Mikhail Baryshnikov, Gregory Hines
Running Time: 136 mins.

Note: Running times are approximate.

Titles scheduled to be released after Commercial Communications Inc. Go to Press.

Franchising calendar

This chart examines the franchise status of communities since February 1985.

California

Cerritos—request for proposals issued.
Chino—award to Marsh Media.
Claremont—tentative agreements to award franchise to Masada Corp.
East Yolo—award to Sonic Cable 7-85 (10,000 homes).
La Puente—award to United Cable 11-28-84 (8,000 homes).
Los Altos—awarded to United Cable 12-84 (9,000 homes).
Palo Alto—awarded 10-7-85 to Cable Communications Cooperative of Palo Alto.
Rosemead—award to Falcon Communications 2-26-85 (11,000 homes).
South Monrovia—award to Falcon Communications 1-85 (6,100 homes).

Delaware

Wilmington—commission's recommendation under review by City Council.

District of Columbia

Washington, D.C.—award to District Cablevision 7-10-84 (25,000 homes).

Illinois

Chicago—Area I award to Communications and Cable (300,000 homes).
Countryside—award to Cablevision of Chicago 6-13-84 (2,200 homes).
Elmwood Park—award to Continental Cable 12-17-84 (9,500 homes).
Naperville—award to ITOC Cable Co. of Illinois Limited. ITOC Cable of Illinois also awarded unincorporated areas of DuPage County. (12,500 homes).
St. Charles/Geneva—award to Central 7-2-84 (10,000 homes).
Wheaton—award to Central 7-2-84 (10,000 homes).
Winnetka—survey showed interest by cable in sufficient to warrant franchise.
Woodridge—terminated franchising process. (500 homes).

Kentucky

Fulton—award to TCI 12-13-84 (2,400 homes).
Loretto—terminated franchise process.
New Haven—award to Crest PB.

Maryland

Baltimore—award to United Cable 12-19-84 (302,000 homes).

Missouri

St. Louis—award to STL Cablevision Partners Inc. (TCI—60%) and St. Louis City Communications (20—ad on 7-13-84 (318,000 homes).

New York

Mt. Upton—terminated franchise process.
North Salem—award to Community Cable Services 12-84 (1,100 homes).
Portland—cable committee formed to begin franchise process. Tribune Cable, Harborview and U.S. Cable sent letters expressing interest (150 homes).

North Carolina

Davie County—award to Summit Cable.
Jackson—award to Cable East (400 homes).

Ohio

Avon—award to Space Cable of Ohio 4-84 (2,000 homes).
Cleveland—franchise awarded to Northcoast Cable 7-85.
Oberlin—preliminary award to Oberlin Cable Coop 6-6-84 (2,600 homes).

Oregon

Dunthorpe—no response to RFP.
Sylvan—awaiting additional legal opinions.

Pennsylvania

Philadelphia—city is divided into four areas. Area I award to Greater Philadelphia Cablevision. Area II award to Wade Communications. Area III award to Rollins. Area IV award to Comcast. 11-84 (each area 155,000 homes).

Rhode Island

Naval Education and Training Center—accepting proposals (2,900 homes).
Newport (Area 2 includes Middletown, Portsmouth, Tiverton, Little Compton)—Bellevue Cablevision Inc. awarded franchise. (29,500 homes).

Virginia

Manassas—negotiating with Cablevision of Manassas.

Washington

Battle Ground—new ordinance drafted. Soliciting interest from operators.
Seattle—city is divided into four parts: Group W, Viacom and Seattle Community Cablevision serve overlapping sections of three parts; part IV is beginning franchising process.

Wisconsin

Hayward—award to Cable TV of Hayward (1,000 homes).
New Glarus—award to Telephone and Data Systems 7-84 (675 homes).
Waterford—award to Total TV 6-84 (600 homes).

Source: International Thomson Communications Inc.

Franchising in the top 50 markets

Rank	Market	Status of core city
1	New York	Municipal—DP
2	Los Angeles	Municipal—DP
3	Chicago	Municipal—DP
4	Philadelphia	Municipal—DP
5	San Francisco	Municipal—DP
6	Boston	DP
7	Detroit	DP
8	Washington, D.C.	DP
9	Cleveland	DP
10	Dallas-Ft. Worth	Franchise awarded
11	Houston	Franchise awarded
12	Pittsburgh	DP
13	Miami	DP
14	Seattle-Tacoma	DP—franchise awarded
15	Minneapolis-St. Paul	DP
16	Atlanta	DP
17	St. Louis	DP
18	Tampa-St. Petersburg	DP
19	Hartford-New Britain-Bristol	DP
20	Baltimore	DP
21	Sacramento	DP
22	Cincinnati	DP
23	Phoenix	DP
24	Kansas City	DP
25	Milwaukee	DP
26	Denver	DP
27	Indianapolis	DP
28	San Diego	DP
29	Nashville	DP
30	Norfolk-Virginia Beach-Newport News	DP
31	Columbus	DP
32	Orlando	DP
33	Rochester	DP
34	Salt Lake City	DP
35	Portland	DP
36	Charlotte	DP
37	Buffalo	DP
38	New Orleans	DP
39	Providence-Pawtucket-Warwick	DP
40	Greensboro-High Point-Winston-Salem	DP
41	Memphis	DP
42	Oklahoma City	DP
43	Jacksonville	DP
44	Louisville	DP
45	Dayton	DP
46	Birmingham	DP
47	Norfolk-Newport News	DP
48	Albany-Schenectady-Troy	DP
49	Honolulu	DP
50	Richmond	DP

Legend

Source: International Thomson Communications Inc.